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ABSTRACT
The present paper is the first in a series dealing with the development of the role of the educational field agent, and deals exclusively with issues relating to gaining initial access and soliciting requests from local educators. The first issue facing each field agent was how to sell his services to the educational community. Initial activities were, therefore, publicizing the program and trying to stimulate requests. A questionnaire was sent to the agents asking them to indicate the origin of their requests over the first few months of the program. Data analysis of the results revealed that the model group of clients represented the most recent status in education held by the field agent himself. This distribution indicates that most field agents may find it easier to stimulate their first requests from a group which is more accessible to them and whose problems are more familiar to them, although the client-group with which a field agent works initially is not always a matter of the field agent's choice. All new social service programs have two major objectives: (1) to establish the program and build acceptance of it among the target groups, and (2) to develop procedures which will help to ensure that the program achieves its goals. (CK)

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FIELD AGENT ROLES IN EDUCATION
PART I

Materials from the

USOE Pilot State Dissemination Program

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This paper has been prepared in connection with our evaluation of the Pilot State Dissemination Program, which is funded by the Division of Practice Improvement, U.S.O.E. The U.S.O.E. Pilot State Dissemination Program is designed to disseminate information (and in particular research-based knowledge), to school and State Education Agency personnel. Field agents in three states meet with clients within designated target areas, identify the client's informational need, refer this need to a retrieval staff located in the State Education Agency (which performs either computer or manual searches), receive the information (in the form of abstracts, microfiche or hard copy) and return it to the client -- all within as short a time as possible. Frequently, the field agent helps the client to interpret the information, evaluate its applicability to his special situation and consider the next steps required for use or implementation. In addition to this strictly informational function, the field agents might try to improve communications between school districts, consult in their own specialty, inaugurate teacher workshops or inservice programs, and so forth.

The present paper is the first in a series dealing with the development of the role of the educational field agent, and deals exclusively with issues relating to gaining initial access and soliciting requests from local educators. Future papers will deal with field agent work on helping clients to use information, and on the management of a field agent project.

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I. Initial Role Definition of Field Agents

The Pilot State Dissemination Project has been attempting to institutionalize a new role in the schools: that of the educational field agent. The U.S.O.E.'s specifications for the role of this agent were very general, indicating only that the individual selected should live in the target areas of the project, and serve as a personal linkage between individuals who wished to receive information and possible sources of information at the State Department level. In fact, one of the difficulties encountered by each of the projects initially was defining the responsibilities and desired behavioral patterns for these individuals who would be a vital link in the dissemination process.

The process of defining the role of the field agent was difficult because of the paucity of similar roles in other contexts that might serve as models. The assumption behind the U.S.O.E.'s program was that the field agent would serve a function similar to that of the agricultural field agent, but in fact there are a number of structural differences between the two roles which makes it difficult to apply the agricultural concept without basic modifications in strategy:

1) The agricultural field agent works with individual farmers who are relatively autonomous. The new educational field agent, however, deals with individuals located in formal organizations of some complexity. The educational field agent must therefore work with power structures, formal and informal groups within the organization, and the barriers to access and innovation that result from these factors.

2) The agricultural field agent's job is to "push" certain innovations in farming techniques. The job of the present dissemination program, in contrast, is to solicit the needs of the educational population, and then try to locate material that might be helpful in solving these needs. This means that the educational field agent must cope with a wider variety of issues at any one time than the agricultural field agent. It also raises the crucial issue of how the field agent is to go about identifying the felt needs of educators.

3) The agricultural field agent is in direct contact with the research source, the School of Agriculture at the State University. Thus, if he has any difficulties in understanding the research, or how to use the research product, he has a direct line of communication. The educational field agent in the U.S.O.E. Pilot State Dissemination Program is not in direct contact with researchers, and must therefore look to other sources if there is any difficulty in interpreting or using research results.

4) The agricultural field agent, although he must deal with resistance to innovation, has the advantage of working with a population that is motivated to adopt the best practices for their own economic good. The field agent, however, must deal with individuals and groups that are not economically motivated.

5) The results of the agricultural field agent's work are usually quite visible. Thus, it is quite easy to prove that one practice produces more or better wheat than another. The field agent's product is more difficult to assess, since there is little consensus among educators on the desirability of specific educational structures or practices, much less on the best means of achieving these ends.

A good deal of work has been done on the organizational change agent, a model that might seem to be somewhat more applicable to the situation faced by the educational field agent. Here again, however, the situation differs along several dimensions:

1) Organizational change agent studies have occasionally used as a major variable in measuring success whether the agent is an "insider" or an "outsider" to the organization. Jones, in reviewing the case studies of this type of literature concluded that the inside change agent was somewhat more effective. The educational field agent in this project, however, is not really either inside or outside, but a unique combination. Like an insider, he has a permanent place in the district and is familiar with the area and its personnel; but he is not attached to any particular school and, because his role is new, will probably not be seen by most educators in the area as part of the school system staff. (This will, of course, presumably change as the role of the field agent becomes more institutionalized.)

2) Most organizational change agents have been invited in for an in-depth diagnosis of the situation, and have a mandate to make recommendations about change and help to carry them out. In effect, they are seen by organizational members as "experts." The educational field agent, on the other hand, has not been given a specific task or area to work on, and is not an expert -- although he has access to experts.

> 3) Unlike the change agent who is located completely inside the organization, the field agent would have a difficult time in fully using the informal network of the organization to achieve certain ends. Aside from the fact that he would first have to gain access to the informal networks, taking advantage of this force could be hazardous since administrators might resent the use of such channels.

The original state proposals for U.S.O.E. support reflected the lack of a well-defined model of behavior for the new educational change agent. Each proposal stressed the fact that the field agent was supposed to be a linker, but gave few specific recommendations in certain crucial areas, such as the degree of directiveness that should be assumed in helping a client to define his educational problem, the level at which the field agent should work within the school system, or the amount of involvement he should have in actually planning and implementing innovations.*

An example of the lack of specificity in these proposals may be seen from the following definition of the field agent's responsibilities in one state:

> These professional persons will be members of the staff of the State Department of Education and will be located in offices provided by the school districts under an agreement with the State Department of Education....The Field Agents will translate overall objectives into local action following the policies of the State Board of Education....The agents will relate with empathy to local administrators and will assist in welding a workable team of State and local professionals into a coalition....State goals will be defined in terms of local conditions, and the Field Agents will assist in reconciling differences between the two.....

*This observation should not be interpreted as a criticism of any of the three states. In an innovative program such as the present one--a program that is characterized by new structures and roles for all of the participants--it is entirely understandable and even desirable that there be uncertainty as to how the strategies of the program should develop. Also, since the Pilot State program was essentially quite decentralized (although there was variation between the states in the degree to which they emphasized central coordination and direction of field agent activities), it was difficult to concretely define the field agent role without taking into account the local communities and their ideas about the functions of the field agents. Thus, it was necessary that the field agent be allowed a good deal of flexibility in the beginning.

Essentially this proposal defined the role of the field agent only in terms of 1) his organizational locus and 2) the responsibility to mediate between state and local goals. It said nothing about how he was to do this. The other proposals defined the field agent roles at similar levels of generality.

Further information about the state project director's conceptualization of the role of the field agent yielded additional evidence that no one had a clear image of what the field agent was to do, or at the very least that there were latent inconsistencies in the expectations held for field agents. This problem can be delineated more clearly by reference to each of the three states:

> State 1: The Project director indicated that he felt that the field agent role should be consistent with the "Havelock model" of innovation in education*, that is, the agent should develop intensive relationships with clients and work through with them all of the stages of diagnosing the problem, choosing a solution, building an environment in the school that is open to change, and so forth. Another part of the program that was equally important, however, was the "Technical Assistance" aspect, which involved getting State Board consultants out into the schools in increasing numbers to perform the same functions that the field agent was presumably undertaking. The relationship between the field agent and these consultants was not defined in any detail, except that they were supposed to work together most of the time. Another problem was that the Havelock model presumes an intensive, and therefore time-consuming, relationship. The structure of the program was such that the field agents were each serving eight or nine rural school districts that were spread over a large area. Another goal marked top priority (on a checklist of possible program goals filled out by each member of the project staff) was that the field agent was supposed to serve a large number of schools. The various goals might be seen as incompatible given the human limitations of field agents.
>
> In discussions with the field agents, the project director placed special emphasis on the process of diagnosis as a result of his belief that the overt needs that people voice are usually not the "real" needs; however, on a checklist which asked him to give priority rating to the field agent activity of "diagnosing the

* See Ronald Havelock, A Guide to Innovation in Education, Institute for Social Research, Ann Arbor, Michigan, 1970.

problems of client rather than accepting their own definition of needs and problems" he marked this goal low. Furthermore, he did not give the field agents significant help in trying to define what it meant to diagnose, and how the field agent was supposed to go about diagnosing.

State 2: Discussions and responses to questionnaires sent to the project director of this state indicated that he placed high priority on giving the field agent initiative in diagnosing problems, even when they were not apparent to the school personnel. He also placed high priority on involving state consultants in all phases of the client relationship. He did not, however, feel that the field agents should necessarily work along with the state consultants once they were put into contact with the school. Thus, he expected the field agents to be very involved initially, but ready to "pull out" once an expert appeared on the scene. This conjunction of goals potentially put the field agent in a very ambiguous position vis-a-vis his clients. A further initial problem in defining the field agent role arose from the fact that the project director felt quite strongly that each field agent should develop his own style of operating without specific guidelines from the project director. Thus, the director was manifesting his concern that each agent develop a strategy that was best suited to his situation and to his individual proclivities. On one occasion he advised a field agent who was somewhat uncertain about his role that he should not discuss the matter in depth with the other field agent in the state. Thus, although the project director had some ideas of his own about how the role of the field agent should develop, the field agents themselves were not aware of his ideas until the project had been underway for several months.

State 3: State 3 initially had the clearest definition of the role of the field agent, which perhaps was owing to the fact that it was the most limited definition. The field agent was not to involve himself in diagnosis to any degree, but was to accept the stated problems of the clients at face value. His main responsibilities were to help the client interpret retrieved material and facilitate the installation of innovations. Great emphasis was placed on the fact that the field agent was not himself a change agent or initiator, but an individual who could help educational personnel by providing the technical and practical assistance needed to make innovations that would be planned by the school personnel themselves. Even here, however, there were some inconsistencies. For example, although the project director felt strongly that the field agent should not consider himself a diagnostician of school problems, he believed that it was acceptable for the field agent to furnish a school person with information that he had not requested--presumably for the purpose of stimulating him to think about an aspect of the school program that had not been previously considered. Although the unacceptable activities were quite clearly defined (i.e., that the field agent should not actively push innovations) the types of activities that were to be regarded as acceptable were less clear.

The main point that emerges from these experiences is that the role of the field agent was initially quite vague. Not only was there little consensus between the states as to what the field agent should be doing, there were inconsistencies within each state. At this point, however, some conclusions can be drawn about the problems and issues that the seven pilot project field agents faced, and some of the solutions that have been arrived at, both individually and collectively. The incidents and illustrations discussed below are drawn from the first months of the program's operations and do not necessarily reflect present conditions in the program.

II. Gaining Access and Acceptance

The first issue facing each field agent was how to sell his services to the educational community. Initial activities were, therefore, publicizing the program, and in the process of publicizing to try to stimulate requests. Prior to starting the job, none of the field agents felt that this effort would comprise one of their more difficult tasks.* In fact, however, it proved to be very time-consuming for some of the field agents, and a number of false starts were made. The following cases are illustrative:

> A field agent made initial publicity visits to each school in the district. In regularly scheduled faculty meetings the purpose of the program was explained, and the procedures for retrieval of material gone over in detail. After this series of meetings (where a few requests were received) the field agent waited for people to call her and request the services. After a week or two she was not receiving requests from teachers and began doing some research for the superintendent of the district in order to gain rapport. Realizing that her initial publicity attempts had not been successful, she adopted two other modes of gaining access: 1) She took advantage of a district-wide textbook fair by setting herself up in a booth with literature on the program. And she reported that a number of individuals came up and asked her for more

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* From goals checklists.

information about the program and how they could contact her. 2) She arranged to meet with small groups of teachers in each school on a more informal basis to discuss the problems that they saw in their classrooms. She found that people were more willing to open up about their needs and problems on an individual level than they had been at the larger faculty meetings. This field agent has concluded that formal meetings provide insufficient publicity for a program that requires considerable interest and participation from individual persons in the schools.

Another field agent, who handled several districts, made initial visits to many of the principals and superintendents in the area, as well as giving a formal presentation to a joint meeting of all the Superintendents. Next, he sent a letter, which was distributed by the principals, to all teachers in his area. This method proved to be quite ineffective as a means of stimulating requests, and the field agent finally decided that the best means of reaching the teachers was to visit in the school lounges, listen to the issues that the teachers themselves raised, and show them how the program could be of use in meeting some of their needs.* These meetings produced a number of requests from individual teachers. In addition, this field agent had access to an internal television set that served all of the districts. A short videotape aired over this system also helped to reach a large number of educators, although the field agent noted that this means of contact served only as a supplement to face-to-face contact.

Another field agent had been a superintendent in the state where he was now serving. Consequently he enjoyed a number of long-standing personal relationships with administrators in his area. Taped interviews indicated that this personal familiarity was very useful in stimulating initial positive response to the program, partly because the client felt a desire to cooperate with a friend, and partly because it was not necessary for the field agent to legitimize to them his interest in and understanding of school problems on an administrative level. This field agent then relied on the principals to disseminate knowledge about the program to their teachers, a method which may be effective in the long run but failed to produce many requests in the short run.

A completely different method of publicizing the program was adopted by a fourth field agent. This individual met with principals at regularly scheduled district meetings. After a brief explanation of the program, he used a "force field" technique for diagnosing a problem volunteered by one of the principals in the group. The emphasis in the presentation was on the technique of diagnosing school problems, rather than on describing the information services of the program. Consequently, it seemed to have rather poor results in stimulating an interest in acquiring information. In fact, many of the principals were rather confused by the procedure. This agent relied on the principals to publicize the program among their teaching staffs.

* Many teachers did, however, remember the field agent's name from the letter which indicates that this effort was not totally unfruitful.

A fifth field agent sought to meet with groups of teachers. Because of the limited time allotted for his presentations in regular faculty meetings (only about five to ten minutes), and his expressed concern for helping teachers with their "problems," he was received with skeptical caution. In one instance, a teacher who had heard his presentation reported that the group was simply amused by his presumption that he had come to solve their "problems." "What problems? Why, we don't have any problems!" was the spirit of their reaction.

These cases highlight some of the points that may be made about the process of gaining access to school personnel and publicizing the service. Although the number of cases was small, a certain consistency in outcomes allows us to draw some tentative conclusion about the initial phase of presenting the program.

Meetings with large groups of people can create a certain level of awareness, particularly among individuals who are already predisposed to use a variety of resources in gaining information. Group meetings do not, however, provide a sufficient understanding of the functions of the program and the ways in which the information resources of the program may relate to an individual educator's specific needs. Several factors may account for this. Large meetings tend by their very nature to be formally organized, and there is usually little two-way communication between the speaker and the listeners. Thus, any confusion or uncertainties about the explanation of the program often remain unclarified. Also, group members tend to be reluctant to ask questions about how such a service might relate to their own individual problems because they are unwilling to highlight the fact that they do have problems in front of a large formal group of peers. Finally, educators are probably over-exposed to meetings in which new programs, projects, curriculum developments, etc., are explained and endorsed, and consequently have a tendency to listen to such material with only half an ear.

A second lesson that may be learned is that meetings with small groups of teachers (or committees) seem to be a very successful technique of stimulating interest in the program. Since teachers often do have unarticulated problems or needs, informal and exploratory discussion with the field agent creates a supportive group atmosphere which stimulates them to think about ways in which they might work on these problems together. In effect, the program becomes more meaningful since the teachers can begin to relate the potential resources of information to their own common situation. Individual meetings between a field agent and a teacher or administrator serve a similar function but are somewhat less efficient for reaching a larger number of people.

Third, prior familiarity with certain individuals or school systems tends to facilitate understanding between field agents and potential clients. The total "outsider" status of the field agent is more quickly transformed into the partial "insider" status which the field agent must assume if he is to work in depth with a need or problem.

Fourth, it is unwise and ineffective to emphasize the need for in-depth diagnosis of problems when explaining the program. This diagnostic technique tends to antagonize some individuals who may understandably ask themselves why an outsider assumes that he has a better grasp of their situation than they themselves have. Also, a strong diagnostic orientation may serve to divert the attention of potential clients from the fact that information may help them with those felt needs that they experience every day.

Fifth, all of the field agents generally agree that it is important to gain initial acceptance, if not enthusiasm, from top administrators before proceeding to lower levels of the school system. A hostile super-

intendent or principal can quash even the most active interest among lower level participants.

A general point that deserves emphasis is that in all of the states where the field agent confronts either a large district or several districts, this process of fostering awareness was much more time-consuming than originally anticipated, frequently running into months. One reason is that the process of publicizing the program soon overlaps with actual involvement in working with the first requests of clients. As the agent becomes involved in retrieving and discussing information with clients, he tends to postpone encounters which are intended only for trust-building. Thus, four months after the project had started, one field agent had not visited several schools in his target area. Another field agent, who had realized early that the process of building awareness would be time-consuming, did not actively solicit requests during his initial visits, but waited until a second round of visits. This strategy took him five months. Thus, although most of the field agents have felt that gaining access was not terribly difficult (in the sense that they did not meet with resistance or lack of interest in the program in most areas) it nevertheless required a tremendous amount of time and effort.

Related to the above is an observation based on the experiences of field agents who initially attempted to use either written material or the grapevine for publicity purposes. Although some requests will usually result from this more indirect type of communication, it is inadvisable to rely on these methods alone if there is an interest in reaching people who are timid about using new resources. If the field agent wishes to reach those typical members of the educational system who are not aggressive innovators or self-starters, it is insufficient

to wait for people to come to him for the service. Active "selling" has been recognized as a clear necessity by several of the field agents. (And yet, it should be noted that the use of a newsletter about project activities has been very successful in one district in keeping people aware of what the project is doing. Since this is the smallest district in the project, however, it is uncertain whether this technique could be successfully transferred to other, larger target areas.)

Levels of Access

As our remarks on the methods of gaining access have indicated, there is considerable variation as to how much attention is given to different groups and levels in the schools. This is not merely of academic interest, since such choices seem to reflect a number of factors in the personality of the field agent, his philosophy of change and initial relationships that emerge in each target area. Incidentally, it should be noted that the project directors themselves indicated in response to our survey of goals that they felt that both administrators and teachers should receive "top priority."

In January, 1971, a short questionnaire was sent to the field agents asking them to indicate the origin of their requests over the first few months of the program. An analysis of the distributions for each field agent revealed that the modal group of clients represented the most recent status in education held by the field agent himself. For example, the field agent who had been a district specialist prior to taking the field agent job elicited 43% of his requests from district specialists; the agent who had previously been a superintendent received 40% of his requests from superintendents; and the agent who had just left a job as a teacher received 47% of his requests from teachers. This disproportionate

representation of requests was reduced quite considerably later on. (For example, the field agent who received 47% of his requests from teachers during the first few months of the program now appears to be receiving less than 30% on average, and has had considerably more contact with superintendents and principals.)

This distribution indicates that most field agents may find it easier to stimulate their first requests from a group which is more accessible to them and whose problems are more familiar to them. Because of this initial familiarity, they may find the problems more interesting, etc. As they develop greater security in their role and begin to branch out to other groups, this imbalance is corrected.

The particular client-group with which a field agent works initially is not always a matter of the field agent's choice, however. Often a client himself will try to define the population that should be served. Two main trends seem to have arisen in this area:

1) When the field agent is recruited from a teaching background, he must often overcome an assumption on the part of administrators that his major effort will be devoted to teachers. For example, one field agent found that a superintendent whom he visited felt that inasmuch as the field agent had little personal expertise in higher level administrative problems, his help would not be useful to superintendents. Another former teacher reported that principals were encouraging him to work with teachers as contrasted with administrators. Both of these field agents have since developed quite a few contacts with administrators, but only by making extra efforts to prove that they could provide materials that would be useful to them. Sometimes this has been a matter of supplying material to an administrator even when a direct request was not made. Or, the field agent might prove himself by bringing in consultants with

expertise in administrative matters. Again, on several occasions principals have become interested in requests made by their teachers, and have thereby gained insight into the potentialities of the program for themselves. In any case, it seems fairly clear that field agents who come from the lower levels of the educational hierarchy have to "prove" their usefulness to administrators to a much greater extent than to teachers.

2) A different type of problem seems to arise for field agents recruited from higher level backgrounds. Such field agents were so eagerly accepted by administrators that they were soon monopolized by them. Naturally, however, when the field agent is dealing with several rather complex administrative problems, it is difficult to find the time to extend the service to teachers. In some cases the agents were actually discouraged from moving toward more involvement with teachers. For example, one field agent was discussing the problem of reaching classroom teachers with one of his more active clients (a district level staff person) when he was told "I have been wondering whether you want to work directly with teachers in this district or if you want to hold only to principal contacts." The staff member then warned the field agent that he would have too many requests to handle if he began to solicit requests directly from teachers.*

3) Another factor that seems to influence the levels on which field agents work is their perception of where the leverage for educational change is located. Roughly speaking, two main philosophies seem to have emerged: one views the locus of change as residing in the

*It may be argued that in serving principal's requests the field agent is often reaching teachers, since relevant material may be passed down. However, the nature of the requests received by the programs indicates that in many cases the felt needs of the principals and teachers are not completely overlapping.

administration; the other views it as residing in the teaching staff.

The first view assumes that the purpose of such a program is to produce fairly wide-spread or long-range projects that will affect a large proportion of the school staff in an area. A further assumption of this view is that administrators are, in general, the only group with sufficient power to carry through major shifts in educational philosophy, initiate structural changes, purchase new materials, and so forth. Thus, although one may get requests from individual teachers, it is most important to involve administrators when trying to pull together the strands of larger issues or innovations. One field agent, for example, indicated that teachers had voiced many diverse problems, but that his main task was to "determine how I can best work with that school...get at these specific problems and launch into a more sweeping endeavor with (the principal)." Another field agent devoted his first year to working with whole school districts on needs assessment programs with the intention of prompting superintendents and principals to express long-range school needs that could be dealt with during the next year. A third field agent signified at the beginning of the program that what he really would like was the authority to be able to mandate changes himself--in the absence of that authority he felt that it was important to work with those who did have it.

The second viewpoint embodies more of a "social work" philosophy --that is, while the main purpose of the program is to create change, one of the best ways to achieve this objective is to help individuals solve their own problems. Often the people with the most interest in working on teaching and curriculum problems are teachers. Principals and superintendents tend to be very occupied with other administrative tasks, and to want a ready-made solution to these problems. Thus, comments like

the following have been made:

> My particular position or job is just to be a resource, whatever that resource is...my objective is to help in one area in every school in every district....Here is something that I have found every time I have dealt with...an administrator. We are not going to get anything disseminated, as far as I am concerned, if we expect the...superintendents to be the ones we are disseminating to... these administrators are not in key with what is happening in the classroom, and they are not so keenly concerned about getting information that will help them to do their job better...they're looking for magic.

Another field agent noted that she did not think that her job was that of a change agent, but someone who should go to clients, find out what they want, and fill that need. The same field agent felt strongly that she should fill as many needs as possible, and not get too involved with any one project.

It should be noted that none of the field agents seem to adhere to extreme positions of either philosophy, and all of them have done some work in both areas. In fact, a major skill needed by the field agents is the ability to recognize where the different philosophies or strategies are most appropriate and to be able to shift between them as the need arises.* However, it seems clear that leaning one way or another between these two positions will have some effect on the clients that are sought out, and the degree of involvement that is developed with particular sets of clients.

The Role of the Intermediate Organization

Another factor that has a great effect on the process of stimulating requests is the support that the field agent enjoys from the local, intermediate organization where he is located. The local organization

*We have been working on an attempt to develop a strategy plan by which the field agent may more easily assess the variables operating in a given request situation, and modify his behavior to fit these requests. A summary of these tentative guidelines is included in an appendix to this paper.

can either facilitate or hinder the role of the field agent in both major and minor ways.

Initially, several of the field agents did not have telephones in their offices. This meant that they could not contact potential clients except by using someone else's phone, by mail or through a personal visit. (Although we have advocated personal initiation of contact by the field agent (see above), we suspect that a number of clients would be willing to make a phone call later on.)

One of the field agents situated in a regional office with several other educational consultants reported that a number of school needs were referred to her by the other staff members. She could then follow up on these needs with the knowledge that there would be some client interest in the service. Another way in which staff members helped her to publicize the service was by recommending that certain persons get in touch with the field agent.

One field agent who worked in a large metropolitan district found that he was getting a number of requests for help that fell under the responsibility of another staff department in the district. Although the department was understaffed, it was not happy about someone else doing its work. This field agent was quite worried about the political problems that would arise if he was not careful to stay out of another department's domain of interest.

Another field agent established very good relations with the director of the organization where he was situated. The director had worked in the area for a long time, and possessed a great deal of information about the characteristics of schools, school personnel, etc. He therefore proved to be an invaluable source of information for preparing visits to schools and in locating potential problem areas. He also gave advice about how to get along with certain of the less "open" educators in the district.

A fourth field agent perceived the director of the organization in which he was situated as not terribly interested in helping him work out activities and strategies for the field agent role. Because of this feeling, he avoided talking with the director about his work for several months, despite the fact that he had inadequate office space to conduct his business.

Still another field agent felt that he could not operate in the district until he had clarified the responsibilities and boundaries of his role with his two "superiors." This clarification was not forthcoming, so he had to spend a great deal of time convincing all of the subordinates in the two major departments concerned with innovation that the services which he could provide would benefit them in their work.

In another case, a field agent who works in a single school district directly under the superintendent's office says that she would never have been able to do her job as effectively if he had not encouraged

her from the beginning to operate independently with no "red tape" attached to her role. The superintendent set her up as a separate department, in effect, so that she would not have to be responsible to anyone else.

One field agent was actually the head of the regional service center. Two other specialists were also attached to this center. The field agent delegated field agent-type activities to the other two specialists, and said of this arrangement: "Unlike in other places, where they rely on one man, here the whole center staff is involved in the project. We're getting feedback from three people instead of one." A division of labor has developed to the point where the original field agent handles only high schools, while one of his assistants handles elementary schools.

The head of an intermediate organiaation set up schedules where and when the field agent should be in the schools. This schedule involved being in the office on Monday and Friday, and in each district in consecutive order on Tuesday, Wednesday and Thursday. The field agent felt that this interferred with the job since client's needs did not always coincide with the schedules.

A field agent who felt closely identified with the intermediate organization stated that school personnel in the area were simply not aware of the multitude of services performed by the organization. Because of this lack of publicity it was felt that much of his most important work remained "invisible" and did not help in generating increased support for the program.

The main benefits (in terms of access) of being attached to an intermediate organization seems to be (1) legitimization of the field agent role through association with an already existing organization, (2) provision of resources for increased awareness of problems or needs, (3) availability of technical assistance for follow-up work, and (4) provision of a supportive, informal environment. In general, the degree to which the intermediate organizations have facilitated or hampered the work of the field agent indicates that this is an aspect of the program that should by no means be taken for granted.

It should be noted that the effectiveness of the organization in supporting the role of the field agent is premised on two basic considerations. (1) In locating the field agent in an agency, care should be taken not to place him in a center which does not have a history of good service

relations with local educators. Whether or not the field agent is officially independent of the organization, the client group will often identify him with it. Thus, to some extent the status of the field agent will be dependent on the status of the organization or of certain better known individuals in the organizations. (2) The organization must be willing, not only to accept, but to give strong support to the field agent role, both in terms of publicity and of gaining access. In two areas the field agent's immediate supervisor gave him little assistance or guidance in publicizing the program, and this omission seems to have retarded awareness of the field agent's services.

With the exception of the lack of telephones and office facilities the majority of tensions that occurred between the organization and the field agents were caused by a poor definition of the field agent's role. Although in the early stages of the program it is difficult to define this role exactly, as we saw earlier it was apparent that many conflicts could have been avoided if the field agents had made arrangements to discuss his ideas with and solicit comments from the organization staff, had worked out some division of labor with the other consultants or specialists on the staff, and also had informed them of the kinds of benefits that they might derive from using information retrieval service in their own work. This approach might serve to preclude jealousies or a sense of competition with already existing roles, and enhance the efficiency and effectiveness of the service.

It is possible that most of these field agents whom we have observed in the Pilot State program were quite lucky in being located in organizations where a great deal of help was available, and where little pressure or resentment of this new role was evidenced. The one

field agent who did have a difficult time in gaining real cooperation from the other members was the only one located in a fairly complex, bureaucratically organized city district. In this case the field agent's services did, in fact, overlap to a certain degree with services being offered by other departments. He was also the only field agent in a situation with highly formal lines of responsibility to other levels of the staff below the level of the superintendent's office. The superintendent himself noted that it was difficult to introduce a "research oriented facilitator" where there is already a county staff or section of special services whose job is to enter schools and stimulate interest in research. As the superintendent pointed out:

> Unlike in (another district) where the field agent comes straight from the Superintendent and need never step over anyone when he goes to schools, (our field agent) is actually performing a model of the work that should be done by existing county staff people. The field agent must therefore step over the heads of (other staff members) to perform his role.

Although it appears that administrative and "territorial" difficulties have now been worked out in this particular area, the process was much more time-consuming than for the other field agents who were able to be more independent. Although this case represents only a single experience, it suggests that it would be advisable to locate field agents outside of an existing staff hierarchy, and also to encourage informal rather than formal cooperation with other specialists. This case also indicates that installing a field agent in urban systems may be considerably more difficult than installing them in less complex systems.

Careful consideration should be given to the amount of "freedom of action" delegated to the field agent, and to the department and level of the system in which he is placed. The field agents who were somewhat hampered by administrative prescriptions concerning their mode of operation

have managed to overcome them for the most part. The field agent role, however, should be intrinsically non-bureaucratic if it is to be effective. That is to say, the field agent role must have a good deal of leeway in adjusting to the needs and idiosyncracies of the client and his setting. Finally, since the field agent will be one of many service specialists working within the district, special publicity should help the local educators to differentiate this new role from that of other, more traditional roles.

It should also be noted that the field agent-intermediate organization relationship is not one-way. The presence of a field agent may enhance the reputation and increase the influence of a district office or service center. In a number of cases, for example, the field agent has been able to involve local specialists in working on significant problems, thus enlarging the specialists' visibility and involvement. One field agent, who is situated in a school district office, worked intensively with the Superintendent to gain acceptance of new programs as part of long-range plans for the school system. Another field agent entered an organization that was just beginning to develop a local image as a provider of educational improvement services, and his presence was instrumental in furthering this effort. In fact, the effect of the field agent's work in enhancing the reputation of the intermediate agency in which he is located may be decisive in gaining the support and active involvement of the agency staff. Needless to say, this effort must not be allowed to undermine the integrity of the field agent's role.

Diagnosis Versus Acceptance of Felt Needs

In one state, as we have already noted, great emphasis was placed on diagnosing the root cause of a problem rather than providing information

to alleviate the direct or indirect effects of the problem. Thus, it was expected that if the field agent found a teacher who complained about low reading levels in her classroom, he would not merely retrieve materials which might help her to improve her reading program. Instead, the field agent and the client were supposed to work through in detail the causes of the reading problem, e.g., lack of articulation between reading programs in the different grades, lack of reading material in the children's homes, too much heterogeneity in the class, etc. The assumption was that the teacher and others affected by (or helping to cause) the root problem would work on it together using materials from the ERIC resource base.

Underlying this keen interest in intensive diagnosis of school problems was the justifiable feeling that improving education was not merely a matter of patching up small rips in the fabric, but of locating basic weaknesses in the cloth itself. This would seem to be an admirable and reasonable goal for a project whose overall direction is to solve educational problems through the application of research ideas. In practice, however, because of the structure of the project and the expectations of clients, it is not always easily achievable. This is true for several reasons.

1) The field agents are not trained professionals in the field of educational and organizational diagnosis. Also, as noted above, they lack a mandate to come into the school for the purposes of intensive diagnosis. Attempts to initiate a disgnostic period may therefore produce some resentment on the part of clients.

One field agent initially attempted to use needs assessments as a diagnostic tool. He felt that with the results of a needs assessment, the administrators in the school districts would be aware of the major areas of concern to students, teachers, parents, etc., and also that they would

have a roster of major problem areas to work on. Several drawbacks to this technique emerged, however. First of all, many of the principals were not enthusiastic about the idea of exposing their schools to examination by outsiders (i.e., parents and community members), and did so primarily because it was requested by the superintendent. One principal, for example, stated that he felt it would cause a lot of problems for him administratively because "maybe kids and parents don't like what you're doing, but it's the best thing...." Another objected that "people don't know enough about the schools....they won't have any (informed) opinion."

When the needs assessment was carried through in districts that had expressed some anxiety about it, there was a tendency on the part of administrators to try and suppress the information, and in one case to consider censuring teachers who had made critical remarks. In one school, in fact, the anxiety about the needs assessment was so high that the principal terminated it before the feedback sessions began.

Secondly, the process demanded a great deal of time--several months for each school--and absorbed most of the field agent's energies. During this period the field agent had little opportunity to respond to the felt needs of these potential clients. Also, for principals who had initially evinced enthusiasm, the lapse in time between the original idea and the end-product was so great that they had for the most part moved on to other problems that were more immediately pressing.

As the field agents have become more experienced in their work and more familiar with the schools with which they are dealing, they have been able to develop diagnostic skills. Most of them agree, however, that unless the client himself is enthusiastic about engaging in an extended study of the needs or problems with which he is faced, there is little to be gained

from overt attempts to change the client's approach to the situation. Indeed, the state that originally placed the greatest emphasis on locating the root problem of clients has since moved to a much more flexible view which takes into consideration such factors as variations in the needs of different clients and in their acceptance of diagnostic efforts.

2) Another tactic in diagnosis of problems is to delegate the responsibility to consultants. Although the consultants may be seen as experts in areas where the field agent is not, it might be noted that difficulties still arise. In several cases, the results of such meetings were very unsatisfactory from the client's point of view. One client commented that diagnostic periods had been unproductive because the consultants had been unable to tell them anything new. Another client stated that he felt that the consultant team had been trying to give a "hard sell." In another case a field agent commented that the consultant had lots of nice theoretical ideas, but few relevant practical suggestions.

Again, it should be emphasized that success in the use of consultants during the early phases of diagnosis is highly dependent on the client's attitude toward such a step. Often there is some reluctance on the part of school personnel to call in outsiders from the State Department or from universities.

3) The need for quick action on a problem may make any kind of extended diagnosis impossible. (Most of the field agents seem to feel that an in-depth diagnosis requires more than one meeting between the field agent and the client.) Many clients feel that the field agent's contribution resides in being able to obtain information regarding their felt needs much more quickly than they are able to get it themselves; thus, the speed of the service is often important. As one client stated:

> The main drawback with using state people is that when they are asked to come into the district they have to fit your request into their schedules, so that they may finally show up after the whole issue prompting you to call them has blown over. On the other hand, (the field agent) is close to the problem, he can identify them more easily...and he responds to problems generally more quickly.

This comment highlights a characteristic of school systems in the United States, namely, that they often operate in situations of crises. Educators often feel that their problems cannot wait for thorough investigation. They value the service, therefore, because it helps them get to work on a problem much more quickly than would normally be the case.

4) Often in the beginning of the program the field agents found that their main responsibility was not to diagnose concrete needs or problems, but simply to get a client interested in using external information. This is particularly true in the case of rural educators, many of whom may be unaware of the potential resources of educational literature. Thus, some of the field agents reported that they were simply playing the role of stimulating interest in the potentialities in the literature.

The easy availability of packaged educational material (PREP, CAT, CAP, etc.) has been most helpful in this effort. Thus, one field agent reported:

> Well, you just sit down and talk to them and ask them what subject they're interested in, even that vague, and they'll say something like counseling, and you show them that (package)--and it's so easy, you get six requests--they just go wild when they see those....

Another field agent has begun sending out lists of available packages to people who have been relatively uninterested in the program, and has found that many of these individuals who were unresponsive to a discussion of their particular needs appreciate receiving and discussing a package.

The above comments should not be construed to mean that diagnosis

is not valuable within this type of program. There are at least two ways in which in-depth diagnosis may become useful in a program such as this one. First, there are probably many school people who are only dimly aware of their own basic problems and who would appreciate any assistance in articulating and in gaining a perspective on an underlying question. Second, the field agent may stimulate the formation of ad hoc committees or study groups to work on specific areas. These groups may themselves gradually move toward diagnosis if there is enough interest and expertise present. For example, one teacher made a request for material on individually prescribed instruction. In the course of looking over the material with other teachers, the idea of a learning resource center for the whole school developed. In another instance, the field agent facilitated the formation of a social science teachers' council for an entire county. This group is enthusiastic about looking at new developments in social science and making long-range plans.

Still another occasion for diagnosis arises when a field agent begins to work with some of his clients on several problems. This situation presents an opportunity to discuss ways in which the separate problems may be related to one another. Clearly this type of interaction with clients--based on mutual trust and recognition of a certain expertise on both sides--may take quite a long time to develop. One field agent, for example, used a simple original request for individualized math textbooks to stimulate a whole series of structural and programmatic changes. Although she realized from the beginning that the school was open to new programs and ideas, she introduced the possibilities of more major changes only after the school personnel had become excited about some of the material that was provided.

If immediate, intensive diagnosis is not often the best tactic for stimulating use of the service, at least some effort in specifying the problem is essential. In most cases it is important to have some contextual knowledge about the client's need if relevant information is to be retrieved. If a teacher wants information about new reading programs, it may be necessary, for example, to know what the spread of ability is in her classes, whether she is willing to look into individualized instruction, what specific difficulties in her present program motivated her request, etc. Several of the field agents have adopted the strategy of obtaining quite general material - perhaps a PREP packet where one is available - upon the initial request, and then using the requestor's reactions to that to help specify more precisely the locus of interest.

The importance of specification is highlighted by several instances in which an educator made a very general request, and then complained that the material returned was "irrelevant" or inapplicable to his school. By discussing the request with the client, the field agent is usually able to avoid such occurences. Since it is very expensive to run large, general computer searches which then have to be sereened for relevancy, the specification process has an impact, not only on the client-field agent relationship, but also on the efficiency of the retrieval process.

In summary, opportunities for intensive diagnosis (as opposed to specification of the request) will be affected by a number of factors. One of the most important of these is the client's trust in, and respect for, the field agent. Since good working relationships often take some time to develop, the field agent should be somewhat cautious

in moving toward a long-range diagnosis, insuring that the client is interested in such efforts, and is prepared to consider seriously the outcomes and potential areas of change which are thereby illumined.

Building Trust and Confidence

The theme of building a trust relationship with clients has appeared indirectly at several points in this paper. We have noted, for example, that there has been some hostility toward attempts to gain access that were too directive, that school personnel were sometimes reluctant to depend upon field agents recruited from another organizational level, and that access may be hindered if colleagues in the intermediate organization are somewhat anxious about the field agent's position relative to their own. All of these examples indicate the importance of developing relationships of trust and confidence, and also of developing a strong reputation among local educators as a responsive, involved individual.

All of the field agents in this project recognized the need to build trust relationships with clients in order to overcome anxiety in revealing problems or skepticism about the benefits of the program. For the most part, they were also aware that this goal could not be accomplished overnight. One field agent, for example, wrote that the first stage of the field agent's work was to:

> create an atmosphere of warmth and fellow-feeling from which trust, faith, confidence and belief can be developed by the client regarding (the field agent) as a person rather than the selling of a product....

Other field agents have mentioned specifically that it is important to build confidence within a whole district, as well as with individual clients if their work is to be really effective.

Most of the field agents began this task by working from the top

down, even when they concentrated primarily on working with lower levels of the school personnel. In those target areas which included several districts, the field agents tried to establish with each superintendent the ways in which they should operate in their particular district. Thus, one superintendent might want the field agent to inform him every time he intends to visit a school in the district; another might say that he would be satisfied with a monthly summary of the field agent's activities; and still another might give him a free hand and require no formal feedback whatsoever. By establishing these requirements before actually beginning to solicit requests, the field agents were able to avoid potential conflict over matters of authority. Such meetings also served to show the superintendents that the field agents had no intention of "working behind their backs."

Another symptom of the skepticism of individual educators in the districts was that several of the field agents reported that clients had made requests just "to test" the capabilities of the program:

> We're getting the feeling that when we go in and ask for requests we're getting something superficial, off the top of their heads....Then, when we get back to them, that wasn't what they wanted anyway....

And another:

> ...Next year I think our requests will be more refined. People will be more honestly seeking information instead of testing the water.

One man, for example, made a request on a subject that he had been gathering material on for a year simply to determine whether he would get the kind of in-depth coverage that he sought. In another state, a client reported that he made a request on a topic in which he wasn't really interested just to see what he would get back. The field agents responded to this initial skepticism by noting that it was essential to produce some concrete evidence of the worth of the program early in

the game. An early success in retrieving relevant material or in helping to solve a visible need in a district seemed to be of tremendous help in building a reputation.

In general, this tendency on the part of clients to "test the water" means that the field agent should not be too selective in accepting requests in the early stages of the program, even when he feels that requests are irrelevant, that clients are not truly involved, or that the need is not one that can be solved by research or other expertise. Each field agent answered some requests of this type early in the program. For example, a field agent was asked where to locate a book that the social science teacher wished to use in her course. Although the field agent felt that it was not part of his role to perform such minor services, he found the book and also put the teacher in contact with the state librarian. Another agent tracked down information about graduate programs in vocational education as a personal favor to a client who wished to return to graduate school. A third field agent helped a client to write a proposal for a grant that would allow the client to develop his own curriculum.

After the role of the field agent (and the field agent himself, for that matter) has become securely established, it is much easier to indicate to a client that his request does not really fall under the purview of the project, and to suggest another person who might be able to help him.

Other sources of skepticism that the field agents found in clients were (1) a reluctance to get involved in more new programs of unproved worth, (2) fears that the program was just another attempt by the State Board to undermine local control of schools, (3) a sense that they

were suffering from an overload of information rather than from too little. Several of the field agents responded by trying to "tempt" the person with a piece of information that seemed particularly relevant to the school. Initially, however, most of the field agents attempted to work toward more productive relationships in order to get the program established locally. Another tactic was to try to gain the client's co-operation in defining the role of the field agent in the district. In an initial meeting with a superintendent the agent would avow that his role was not really well defined, and that he would like some help in developing it. This approach had some unfortunate consequences in that it gave the impression that the field agent was not sure about the purposes of the program. It also elicited some suggestions for the role that were incongruent with the way in which the role was defined by the state project. For example, several superintendents replied that what they really needed was someone to improve communication between schools within their district so that new, "home-grown" practices would be brought to everyone's attention. One of the main purposes of the dissemination program, however, was to put educators in touch with developments on the state and national level. Field agents who tried to define their functions quite concretely in the beginning of the program rather than eliciting the expectations of the client did not run into this problem.

An important aspect of building a trust relationship is to make the client aware that the field agent will not transmit certain types of information to the client's superiors. This issue goes beyond the problem of mere skepticism and is more a matter of apprehensiveness. One field agent indicated that she thought it was absolutely essential

to make clear in the beginning of the relationship that the client's confidences would not be violated. And the superintendent with whom she worked agreed that one of the field agent's strong points was that she never "tattle-tailed": "The teachers wouldn't accept her if she did."

A corollary of the above point is that the field agents have discovered that it is essential for them to remain outside of "politics." This was brought home very forcefully to the two field agents who were situated in target areas where a school coordinator had previously performed many of the same functions as the pilot state field agent. In both cases the coordinator had been forced to leave the district after becoming involved in "in-fighting" between various administrators. These two field agents (and their immediate superiors as well) noted that it was important for them to be discreet and not too agressive in the beginning inasmuch as people were still suspicious of this type of role. Another indicator of the fact that the field agents believed in avoiding involvement in "political" problems was seen in a checklist of goals sent to all of the program staff. One item on the list - "(the field agent should) serve as a mediator in disputes between the State Department of Education and local schools", was rejected entirely or given low priority by all except one field agent.

A final point on building confidence and trust concerns the degree of formality in client-agent interaction. There is great variation among the field agents in this regard. Some are informal and even chatty in meetings with clients--discussing the hunting season, what they've been doing with their week-ends, etc. Others tend to focus almost exclusively on the business at hand. As far as we can tell, this factor does not have any appreciable effect on the field agent's success in

building trust relationships with their clients. All of the agents, however, feel that it is important to develop empathy with client needs, and not to allow the relationship to become entirely formal.

Conclusion

In every new social service program or pilot project there are two major objectives. The first is to establish the program and build acceptance of it among the group whom the program is to serve, while the second is to develop procedures which will help to ensure that the program does what it is supposed to do. It is clear that the second objective cannot be accomplished without at least a solid beginning on the first. The above discussion has concentrated on a few of the problems and issues in developing acceptance for the new role of the educational field agent, not because the problems have outweighed the successes, but because it is hoped that future projects of this type will be able to learn from the pioneer efforts of the first states which have attempted to institutionalize the field agent approach to dissemination of educational information.

APPENDIX

DEVELOPING A STRATEGY BASED ON PARTICULAR CLIENTS AND THEIR SETTINGS

Sam D. Sieber

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October, 1971

I. Conditions, constraints, etc.

(Try to identify the following conditions, then fit your strategy to them.)

A. Organizational features:

1. Innovativeness of the school or district -- past trends, commitment of administrative staff, willingness to spend for innovation, etc.

2. Formality or informality of the system -- level of bureaucratization, rules and regulations, official channels of communication, centralization of authority in superintendent's office or principals' offices...(This factor is highly related to the size of the school or district, of course.)

B. Characteristics of individual clients

1. Role orientations:

Job holder -- the teacher who is mainly working for the pay check, wants things to run smoothly with little disturbance of set ways, may be waiting for marriage; security-oriented.

Organization man -- usually an administrator: concerned primarily about image of the school, efficiency of operations, compliance with rules and regulations, increasing public support by winning football teams, etc.

Careerist -- the individual (may be teacher or administrator) who is concerned mainly with his future career advancement in educational establishment, desires prestige or power or higher income, wants to climb the latter of success for private gratification; is concerned about what superiors think of him.

Professional -- the teacher or administrator who is primarily dedicated to pupils as individual clients in need of education, training, growth, therapy, understanding of needs and problems, etc. Often stresses more "individualized learning" or improved "staff development"; engages in curriculum building, institutes, workshops, and so on. Tries to keep up with professional literature; wants to observe other educational systems nationally or internationally.

2. Innovativeness.

Teachers or administrators who are always searching for new ways and trying them out in the school, or urging others to try them out, would score high on this dimension. His ideas may be seen as "far out" by other school staff, and he may be viewed as a disturbing element in the organization. Often he is a "deviant" in some way, that is, he may come from outside the district, tend towards liberalism in politics, have artistic or intellectual aspirations, be an activist in the community, etc.

Because of his "deviant" social orientations and patterns of behavior, however, this individual must not be confused with an opinion leader among his colleagues. He may have little influence in the school and not even be well liked. But he often has sound ideas about educational change, and rather specific information needs. In fact, he may already "know" the solution, and only want resources for implementing it.

There are probably three personality clues: high energy, a wide "effective scope" (knows about research, innovations, reads widely, travels, etc.), and a sense of personal efficacy (thinks he can get things done, attacks difficult tasks, etc.)

3. Influence, leadership (informal)

Often there are informal leaders in schools who can influence the opinions and behaviors of other teachers or administrators. Because these individuals are highly respected they may not be the innovators, who are often "deviants" in some respects. However, if they can be won over by field agents and can be made innovative, they might bring along the rest of the staff. The best clue to these individuals is the extent to which other teachers or administrators seek them out for advice about problems, or listen carefully when they speak up at faculty meetings, etc. They are probably also older persons with established positions in the community.

4. Power (formal influence and sanctioning authority)

These are almost always administrators, of course. But not all administrators have real power -- if the superintendent insists on control, a principal may be pretty weak in his own school building. This person can usually be identified by noting his organizational accomplishments in the past.

II. Tactical dimensions of field agent or communication specialist styles

As I said at the training session, these dimensions were derived from the discussions in Kansas City. There are others in the books on change and the research literature, of course, but these seemed to be the major foci of concern among the field agents in the Pilot States, and may therefore be more realistic.

The combination of positions that are adopted on each of these scales might be termed the "strategy" of the field agent with respect to a particular client. Quite obviously, there are a large number of alternative strategies, since the scales may be combined in a variety of ways depending on the type of organization, role orientation, innovativeness and formal and informal influence of the client.

DEGREE OF INVOLVEMENT OR RESPONSIBILITY OF FIELD AGENT

		LOW			HIGH
INPUT TERACTION	1	Raise awareness		Catalyze, "turn on"	Advocate specific products, practices, solutions
	2	Gain tolerance or "wait and see" attitude		Gain trust	Gain faith, dependency
	3	Identify felt need		Specify, clarify need	Diagnose "real" problem
FORMATION RESOURCES	4	"How-to-do-it" materials; curr. guides		Think-pieces; "state of art" writings	Research reports
TPUT TERACTION	5	Transmit		Furnish alternative solutions; help determine feasibility, etc.	Advocate specific products, practices, solutions
	6	Communicate		Give or build support, encourage action	Implement, install
		A		B	C

III. Some examples

EXAMPLE: If the field agent believes that he is faced with an "innovator" with a "professional role orientation," all he need do is raise awareness about the information service and its available resources (1A). Also, he doesn't need to do more than gain tolerance, or willingness to try out the service (2A). Further, since the innovator will often already have a solution or specific need in mind, the agent can just identify the felt need (3A); however, it might be advisable to try to stimulate the innovator to consider alternative needs or problems, and so the agent might get into diagnosis occasionally with an innovator (3C). Depending on how far his thinking has gone, the innovator might be ready for "how-to-do-it" materials (4A) or might want to read more widely before taking direct action (4B or C). Probably it would be sufficient to simply transmit the information or resource (5A) and also to simply communicate (6A), because the innovator with a professional role orientation will decide about his <u>own</u> solutions and eventually take action by himself. Also, if the innovator is not a fully accepted member of the staff group, the agent's involvement in advocacy and implementation might cause him to become identified with an unpopular person or cause. However, if the school structure is highly bureaucratic and centralized, and is not accustomed to innovative activities, then the innovator's efforts might be foredoomed <u>unless</u> the agent helps set up the machinery for moving the school toward innovation, and gently endorses the innovation with the administration. This approach would consist of a middle course of action or involvement (6B).

EXAMPLE: An agent might diagnose his client as a "job holder" in a rather flexible and innovative school. Here the task of the agent would be to catalyze, and perhaps even advocate specific practices or try-outs (1B or 1C). Tolerance would be important in the beginning (2A), but the agent might have to move toward trust and even faith (2B and 2C) in order to fully engage the cooperation of the client. Also, it would probably be insufficient to simply identify a felt need; what the agent needs to do with the job holder is to get behind his "presenting symptom," that is, to diagnose (3C). For example, he might want help to control his class so that there is less strain on his teaching role. He should then be confronted with the possibility that his discipline problems are his own doing -- through lack of individual attention to students, inadequate understanding of students' emotional needs and social problems, or just dull teaching. It seems unlikely that research reports or perhaps even think-pieces would appeal to the job holder; "how-to-do-it" materials might be just what he needs (4A), provided that the materials are based on the agent's and client's joint diagnosis of the latter's need. Finally, it might be advisable for the agent to play an active role in helping the job holder explore alternative solutions and determine feasibility, and perhaps even move into advocacy at the proper moment (5B or 5C); and since the school is open to change, help with implementation might not only be advisable, but quite acceptable. In fact, the innovative administrator might be <u>grateful</u> to the agent for pushing the job holder into a more innovative behavior pattern and following through with him.